The Norman Lear **CENTER**

The Business and Culture of Social Media

in search of the people formerly known as the audience



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The Norman Lear Center

The Norman Lear Center is a nonpartisan research and public policy center that studies the social, political, economic and cultural impact of entertainment on the world. The Lear Center translates its findings into action through testimony, journalism, strategic research and innovative public outreach campaigns. On campus, from its base in the USC Annenberg School for Communication & Journalism, the Lear Center builds bridges between schools and disciplines whose faculty study aspects of entertainment, media and culture. Beyond campus, it bridges the gap between the entertainment industry and academia, and between them and the public. Through scholarship and research; through its conferences, public events and publications; and in its attempts to illuminate and repair the world, the Lear Center works to be at the forefront of discussion and practice in the field.

The Collaboration

This project represents a collaboration between The Norman Lear Center at the USC Annenberg School for Communication & Journalism, The Centre d'Innovacio at Barcelona Media and the Universitat Oberta de Catalunya.



The Presentation

This presentation was given at a conference on The Business & Culture of Social Media on June 26, 2009 in Barcelona. Attendees included UOC faculty and researchers at the Barcelona Media Center.

Transformations: A Summary



Transformations:

- the audience
- the advertising model
- the business model

We will talk about **three transformations**: the transformation of the **audience**; of **advertising models**; and of media **businesses**.

We will talk about how they were transformed first by *digital technology*, and how they are now being transformed by *social media*.

We will describe what we call the "three economies" which govern the era of social media.

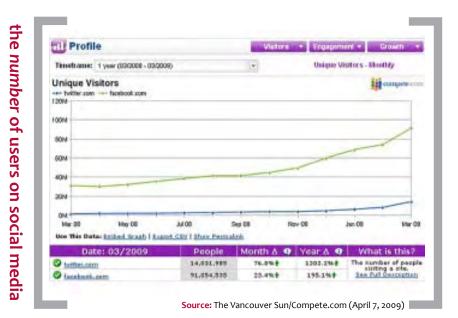
And we will propose some research needed in order to *understand* and to *monetize* the audiences of this era.

We begin with the explosion of the social Web. >>>

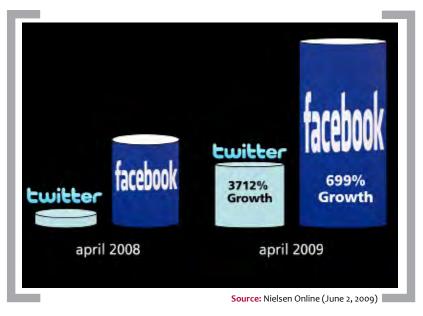
(And while the Internet is of course global, we will be focusing on the U.S.)

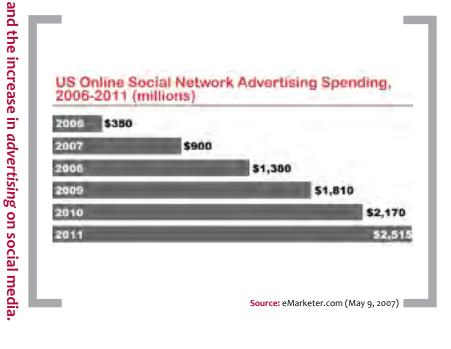
Transformations:

We see the growth of the social Web in many ways, such as a surge in: >>>



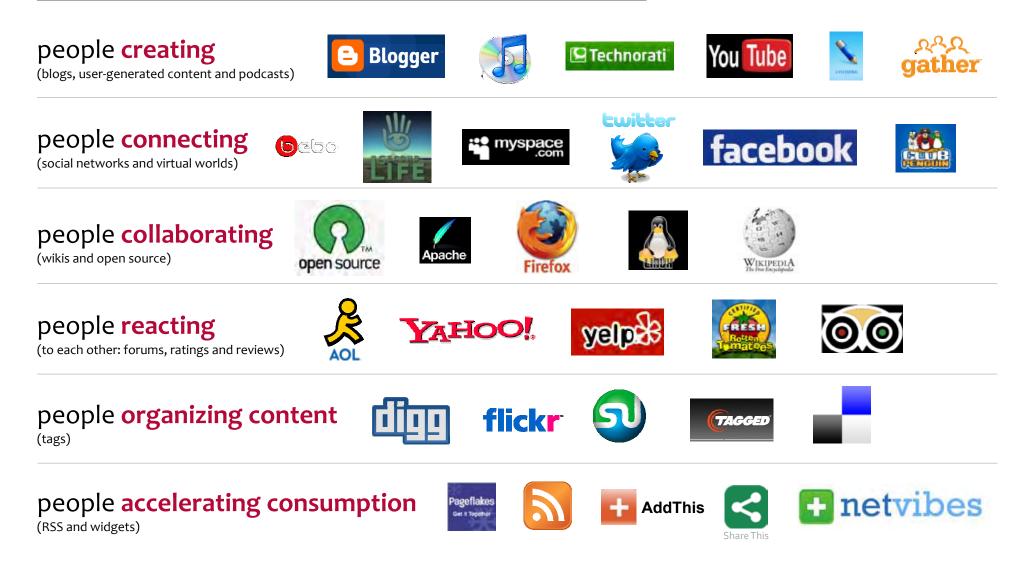
the time spent on social media





Social Media Defined

What do we mean when we say **"the social Web"**? There are many ways to define it. Here is Forrester Research's taxonomy, which divides it into six user activities, which of course overlap.



Transformations:

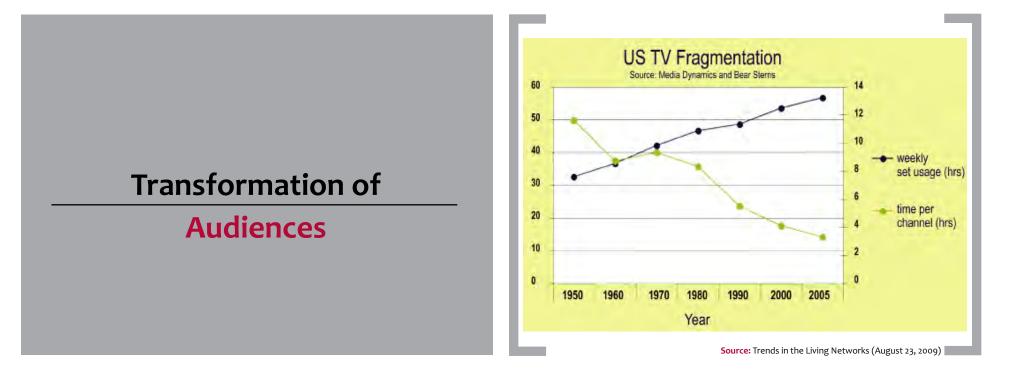
www.learcenter.org

The rise of the social web has accelerated three major transformations which have been under way since the rise of the Internet:

(1) the transformation of audiences
(2) the transformation of advertising models
(3) the transformation of media businesses

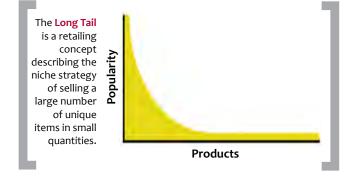
And these three transformations have led to a transformation of **mass communication**.

Let's look at each of these three transformations in turn. >>>



Even before many of these social media applications existed, we had *already* experienced major **changes caused by digital technology**, such as:

- The audience's ability to **shift time**
- The proliferation of programming options
- And the proliferation of **platforms.**



In recent years, we saw the results of this, including:

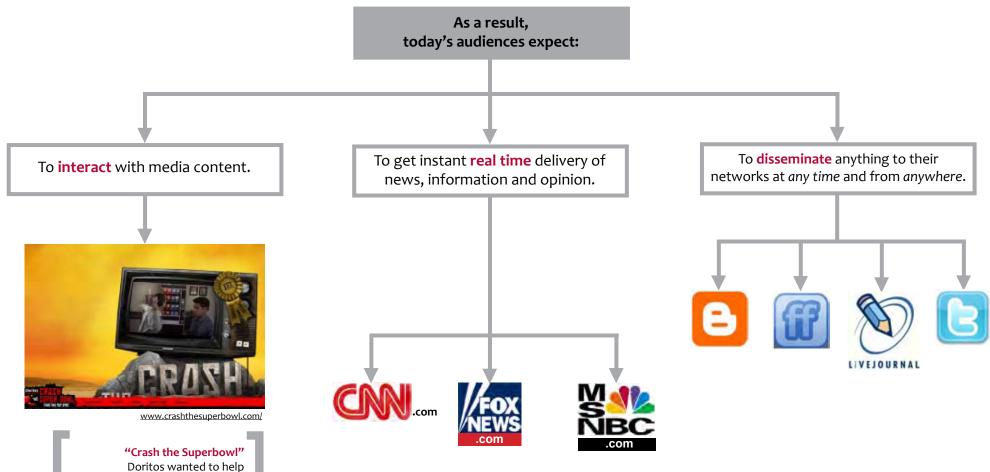
- Audience fragmentation
- Niche consumption
- And the displacement of the mass audience by the long tail.

Today, the spread of **mobile** technology and the increased penetration of **broadband** have enabled *social media* to **accelerate** the transformation of the audience.

Today's consumers have become:

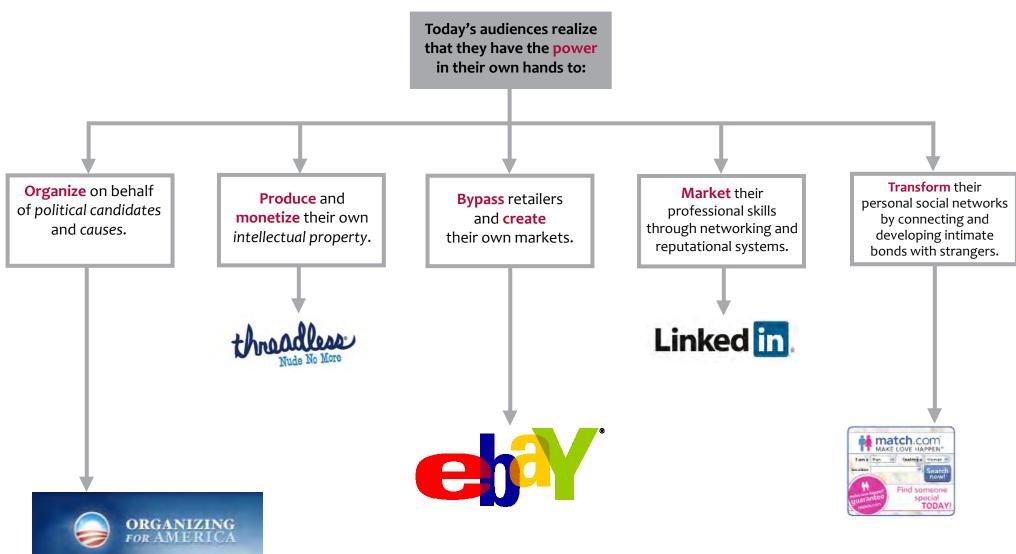
- Producers of content
- **Programmers** of content
- Marketers of content
- Editors of content
- And **publishers** of content.

Transformation of Audiences:



Doritos wanted to help consumers "Crash the Super Bowl" by letting them create their own ads. The winning ad creator would win \$1 million.

Transformation of Audiences:



Now we turn to the second transformation. >>>

Transformation of Advertising Models



As audiences have changed, advertising models have had to adjust. Even **before the social media** earthquake, advertisers and their clients had to learn:

- To **count** audiences in different ways (How does DVR use affect Nielsen analysis?)
- To **follow** audiences to *new platforms* (mobile, Web, TV) with appropriate content
- To create **branded Web sites** to attract potential customers.



The **consequences** of this, as we saw in the early years of *this* century, were that advertisers and their clients used:

- More product placement (Coke on American Idol)
- More **personalized and participatory marketing** (contests, polls, coupons)
- And more **advertainment**.

And so while advertisers *already* had felt the powerful impact of Web technology, the **rise of social media** has *accelerated* changes in advertising models, and advertisers have found themselves *less* sure-footed.

This is because **consumers** have become **even more elusive**.

Transformation of Advertising Models:

Real Life and Virtual Life

You are a **brand**.

Today, consumers can take on different **identities** and go places where you can't easily find them.





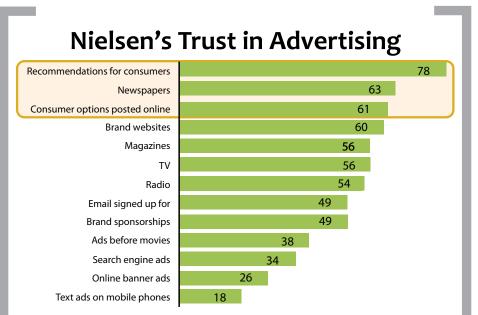






Consumers also spend more time **interacting with each other** than they do with you.

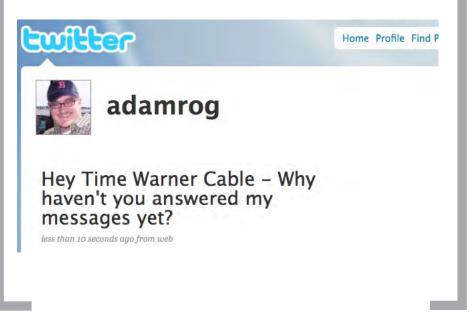
Transformation of Advertising Models:



Consumers now **trust each other** more than they **trust your business**.

Source: Online Marketing Performance (January 27, 2008)



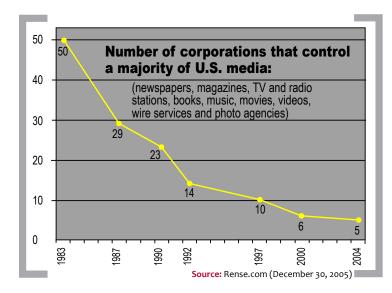


Now we turn to the third transformation. >>>

Transformation of

Media Businesses





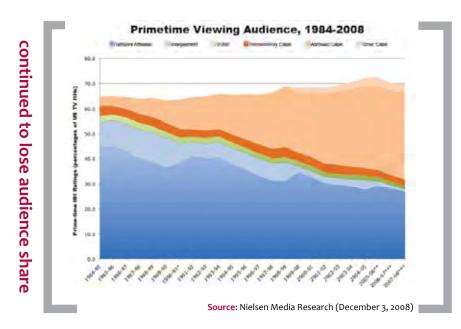
Media businesses also had to adjust *early on* to the rise of *Internet* and *digital* technology.

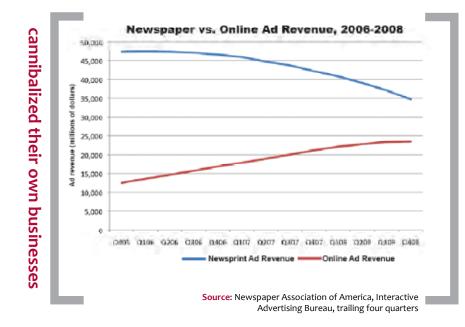
Even before Facebook and Twitter, media businesses were already:

- Attempting to protect intellectual property from piracy
- Competing against content on new interactive platforms by developing new **participatory genres**
- Trying to take advantage of new **delivery channels** for media, often by recycling and repurposing their content
 - Trying to **consolidate** and **vertically integrate** to meet the threat of competition.

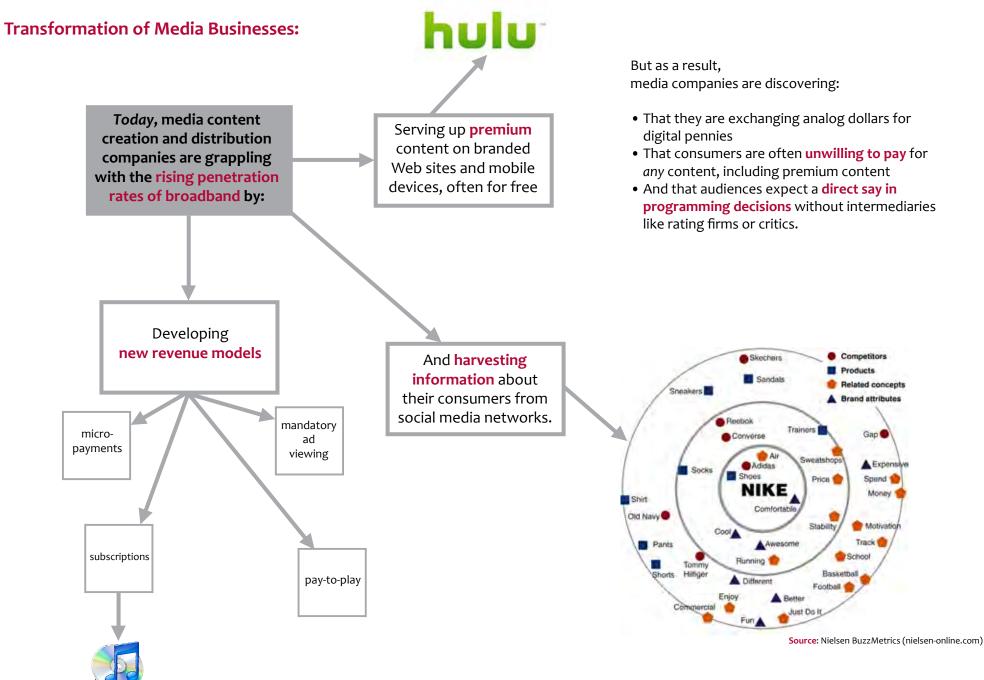
Transformation of Media Businesses:

Yet despite these efforts, media businesses: >>>











The consequence of the rapid penetration of **broadband** and **mobile**, and of the proliferation of **social media**, has been the creation of a network society and the transformation – as Manuel Castells calls it:

from

mass communication



We believe that this era of mass self-communication can be best described as **three enmeshed systems**, each of which functions like an economy:

- The COMMERCIAL economy
- The GIFT economy
- And the ATTENTION economy.

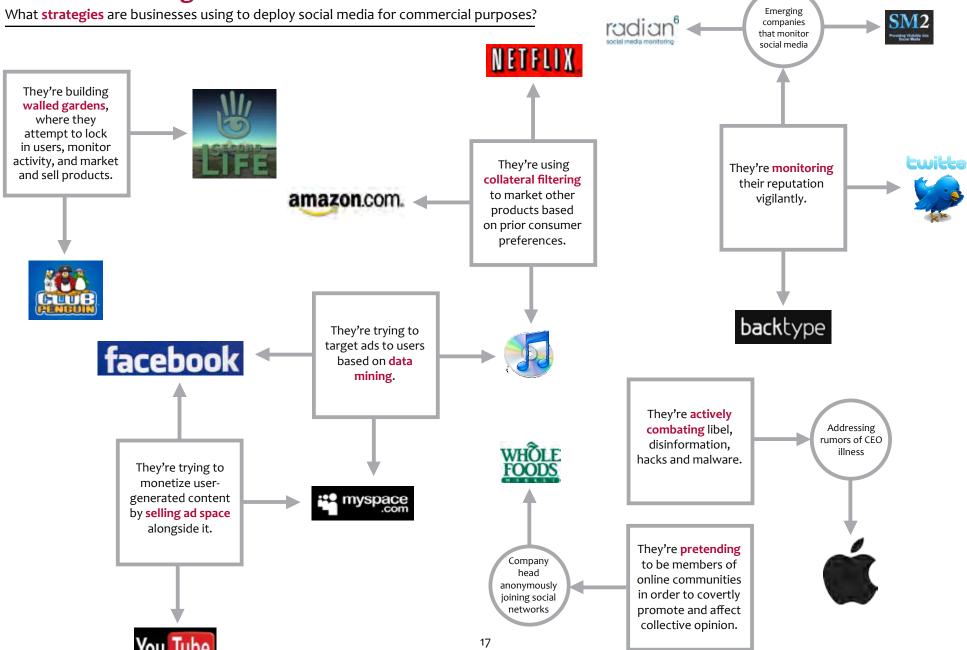
First, the Commercial Economy. >>>



When **businesses create social media**, or when they leverage it for their profit, they are driven by the imperatives of the **Commercial Economy.**

We're talking here about *all* businesses – not only media companies, but the entire enterprise sector, which is embracing, or being forced to embrace, social media.

Business Strategies





The Gift Economy is the system of cultural exchange that most participants in social media implicitly embrace as a set of values and practices.

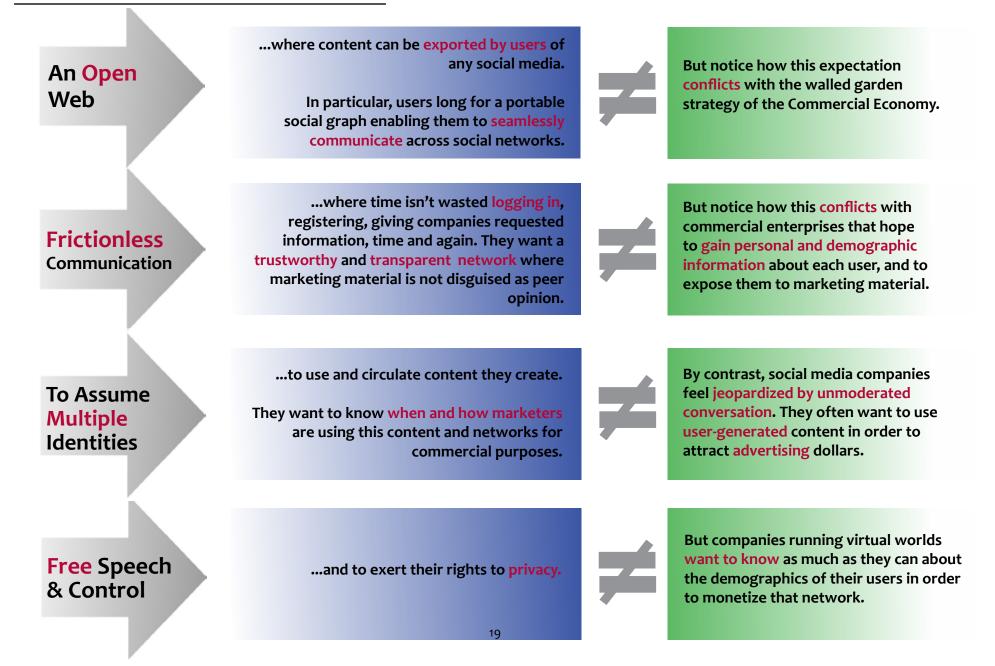


The Gift Economy is built on **trust**, **sharing** and **barter**. It is not unique to social media; it is an aspect of all forms of *cultural collaboration*.

Participants in social media develop new content there not only for their own use, but also in order to share, and often to co-create, with friends and strangers.

Participant Expectations

What do participants in social media's gift economy expect?





So there is a **conflict** between the Commercial Economy and the Gift Economy.



Companies want **feedback** and **satisfied customers**. At the same time, users want the opportunity to **express their opinions** about products and to have an impact on the products they consume.

Companies want users to **spend time with their brands**, products and marketing materials. At the same time, users often want to **find out more** about the brands they love, and to connect with others who feel the same way.

So with the advent of social media, companies and users can more easily **collaborate** on new products, tweak product features and co-produce marketing campaigns.

The systems that govern mass selfcommunication – the Commercial Economy and the Gift Economy – are in turn enmeshed in the Attention Economy. >>>



We live in an information age.

We are **bombarded** by information 24/7 – marketing messages and social messages; media we consume and media we cocreate; content we choose and content that chooses us.

But people have **limited bandwidth** to deal with all of that information.

"what information consumes is rather obvious: it consumes the attention of its recipients. hence a wealth of information creates a poverty of attention, and a need to allocate that attention efficiently."

- herbert simon

At the **Norman Lear Center**, we argue that the need to capture, hold and allocate attention is a driving force – maybe THE driving force – of daily life in all industrial societies.

If you are looking for one English word to describe the capturing and holding of attention, the word is **entertainment**.

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What is Entertainment?

Entertainment (entartenment). 1531. [f. 3. One who +1. The action of taking as prec. + -MENT. ASM 3). (into service; service, employment -1662, Also son. 1764. tconcr. pay, wages -1709. +2. Support; susa. b. It is tenance -1761. †3. Treatment -1660. 4. Ocare not, that cupation (of time). Now rare, 1551. 5. The celsus. .an a action of occupying attention agreeably; that Enthusi which affords interest or amusement; esp. a Gr. evoous public performance of a varied character 1612. A. adj. † t6. Accommodation -1721. ty. Reception: possession manner of reception -1692. 8. The action of Characteria receiving a guest 1594. b. concr. Hospitable transf. qui provision for the wants of a guest (now arch.) characteriz 1510. c. A meal; esp. a banquet. Now rare. 2. transf. 1607. g. The action of receiving, of taking into E. admirers stical a, (in consideration, or of harbouring 1586. 1. The Saxons. . desirous of intertainment to serue +B. sb = Enthyn

in warres HOLINSHED. 3. The savage e. He met with in it [the World] BOYLE. 4. L. L. L. v. i. 126. 5. An Oration.. to give the visitours intertainment 1612.

The Oxford English Dictionary defines entertainment as "the action of occupying attention agreeably." Its Romance language root is *entretenire* – **to hold**.

And who is being held can be correctly described as an audience.

Life is theater. All the world's a stage. An attention economy creates an entertainment society.

The Attention Economy

Every domain of modern life is affected by its existence within the **Attention Economy** – for better and for worse.



www.learcenter.org

The Attention Economy

Today, there is scarcely a domain of human experience unaffected by the battle for eyeballs...



The Attention Economy

...the search for celebrity, the imperative to amuse, the need to stimulate and titillate...



The Attention Economy

...to tell us stories, to play with us.



The need to grab and hold attention – to entertain – is as true for individuals as for companies; for people as for products; for the Gift Economy as for the Commercial Economy.

Those at each node in the network society must compete for attention to promote their ideas, causes and cultural creations, including themselves.

Everyone is a brand, and every act of communication is also a media campaign to market that personal brand.

Mass Self-Communication = Entertainment



We would like to propose that **mass self-communication is entertainment** in two ways:

First, successful mass self-communication requires **capturing and holding attention**.

If you want to participate in social media, you must attract an audience. You must be a performer on a very public stage. You must draw on some of the same tools that entertainers have used since the beginning of time.



Second, as a consequence of this, the **act of participation** in social media is **entertaining in itself**.

Communicating and connecting with friends and strangers is (like entertainment) compelling, engaging, time consuming, pleasurable – and, some would say, addictive.

It appeals to our primal human urge to exchange stories, to gossip, to flirt, to pretend, to play.



The Fragmented Media Landscape

What are the **implications** of this for businesses – especially for media businesses – and for anyone who hopes to thrive in these enmeshed economies?

Of course succeeding in this environment means attracting an audience.

The problem is that media businesses and commercial interests of all kinds are having a hard time locating large, cohesive audiences in our fragmented media landscape. Television used to be a safe bet, but those audiences are becoming smaller every quarter.

We argue that the easiest way to locate an audience is to **find out what entertains them.**

One of the dictates of the attention economy is that humans are attracted to material that entertains them. Even in our complex media environment, content remains king. Oddly enough, the content that often garners the most attention in online media was **created in the old media industry**.

Entertainment in the Fragmented Landscape

What is the Media Sector?

Barcelona Media's specific area of action is the communications industry, which encompasses any industry concerned with the media, content or audio-visual production.

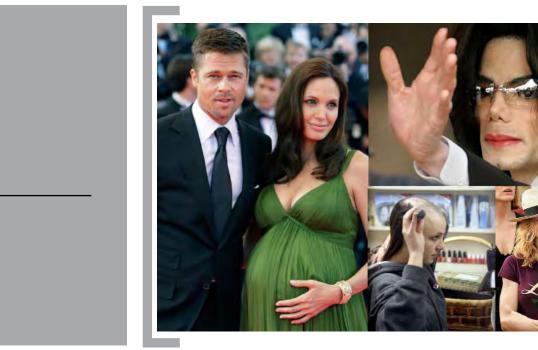


Source: Barcelona Media Center (www.barcelonamedia.org/informacio/en)

Conventional, twentieth century entertainment fare – especially **movies**, **TV shows, music, sports**, and the celebrities that star in them – this is the material that consistently attracts massive online audiences. Even though the media landscape has vastly expanded, and now includes citizens and consumers from around the world who are taking advantage of the tools for mass self-communication, the entertainment business continues to play a prominent role in the attention economy.

This helps to explain why some of the most popular sites on the Web devote so much of their online real estate to traditional entertainment fare.





The Power of Entertainment

Sites that compete for global audiences often rely on movie stars and celebrity gossip to keep their audience coming back for more.

While conventional forms of entertainment content play a powerful role in online and offline media, other types of media personalities and products also dominate this space: **politicians, religious figures, criminals, starchitects, global consumer brands, blockbuster books, news personalities and billionaire businessmen** also enliven these spaces, filling them with recognizable, relevant faces that audiences gravitate toward.

Even on social media sites, where people have the tools to entertain themselves and to build their own content and their own private audiences, we find that traditional entertainment content still plays a powerful role.



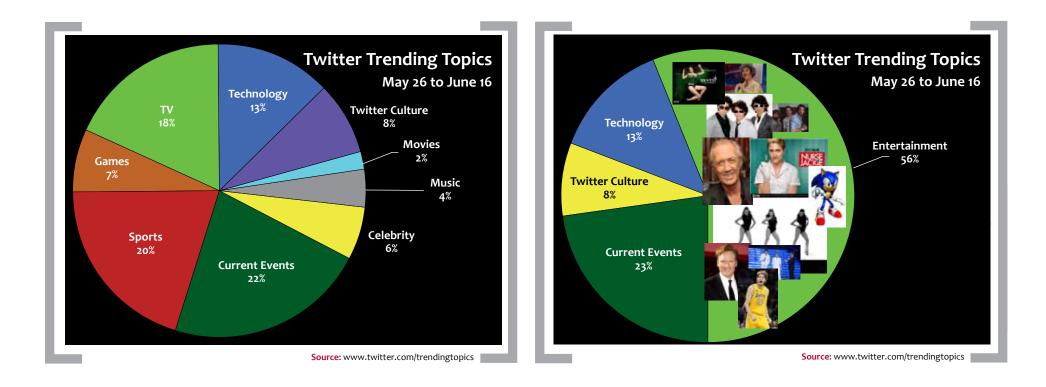
Online gurus constantly talk about the importance of *relevance* in an online environment: it should come as no surprise that **entertainment fare**, such as an advertisement for a blockbuster film, often qualifies as the most relevant

content for large

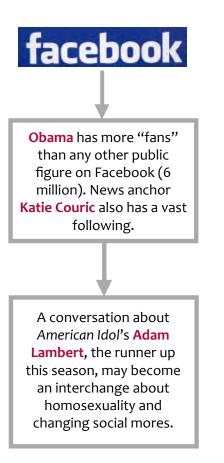
online audiences.

Twitter Trending Topics

We wanted to find out exactly how much of the content in a social network is about entertainment topics. So we did a little in-house research project. We compiled all of the most frequent topics being discussed on Twitter from May 23 to June 16, 2009. We found that **entertainment accounted for more than half of the trending topics on Twitter:**



Entertainment Content on Social Networks





About 40 million people saw **Susan Boyle** in the finals on *Britain's* Got *Talent*, but at least 125 million watched it online. It should come as no surprise that all over the Web, Susan Boyle was suddenly everywhere. She got embedded into existing conversations because some aspect of her personal story was seen as relevant to what they were talking about.



sites are dependent on celebrities. In their marketing materials, LinkedIn points out that executives (like **Bill Gates**) from the Fortune 500 are among its members.



Ning, a site that allows people to create their own social networks, has blossomed because of its famous members: Enrique Iglesias, 50 Cent and Ellen Degeneres to name a few.



Oprah Winfrey's debut on Twitter resulted in a 43% increase in traffic.

Actor/producer Ashton Kutcher was the first user on Twitter to surpass 1 million followers. Now you see contests among celebrities to build massive networks.

Countless discussion threads about pop star **Rihanna** became conversations about domestic abuse after graphic pictures of her were released.

Entertainment Content on Social Networks:

Social media has not made old media obsolete. It has made it even more desirable. Because social media demands more interaction than passive media required, the consumption of traditional entertainment in a social media context is even more engaging for fans. **"Water cooler conversations,"** as we call them in the U.S. – maybe they're "coffee-time conversations" in Europe – are often about the latest reality show or the most recent media personality. Those conversations are also taking place on Facebook, Twitter and Bebo, where participants not only communicate with other fans, they entertain one another with their knowledge and anecdotes; they introduce fans to related content; and through their continued interaction, they may forge bonds that extend well beyond an episode of *American Idol*. Mass media celebrities, products and phenomena are the perfect conversation igniters, potentially sparking conversations about every aspect of modern life.

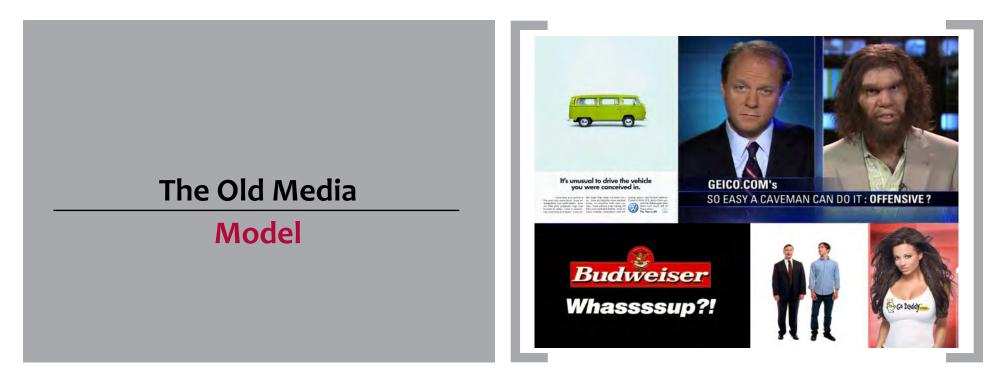


And not only are audiences drawn to broadly disseminated entertainment content, they also take pleasure in tracking the popularity of these subjects. In other words, data about what dominates the attention economy – whether it's Michael Jackson's auction or Berlusconi's marital infidelities – is itself compelling. Audiences gather around this content as well, exchanging ideas and information about why certain topics are dominating the global conversation. Perhaps in their effort to remain relevant themselves, participants in social media are particularly obsessed with monitoring who's dominating the attention economy.



And while we may scoff at the trite topics that galvanize public attention, what is more powerful than galvanizing public attention? Sometimes the stakes are quite high – whether you're an Iranian protestor, a baseball player, or a singer, (*Aaron Carter gave out his cell number on Twitter and landed on the trending topic list*).

So how do businesses who are looking for audiences take advantage of this situation? >>>

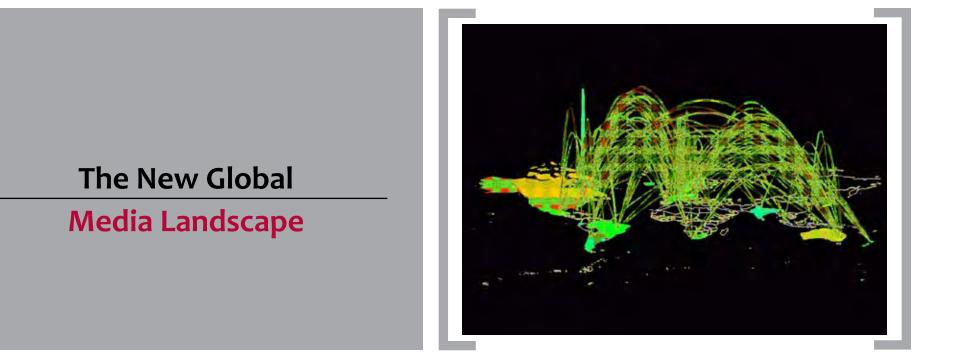


It may seem at first glance that the simple imperative is **to amuse**: whether they're selling toilet paper or magazine subscriptions, businesses must distinguish themselves in the attention economy by engaging their customers.



In the 20th century, this effort unfolded within a media landscape. Businesses developed advertising strategies, **attaching information about their products to programming** that attracted the right kind of audience. In some respects, this model has remained the same, in that it remains imperative that businesses locate audiences that accrete around entertainment content in order to attract their attention, however partial or fleeting.

The challenge of the **new global media landscape** is that audiences have dispersed across platforms and channels. But the upside of this situation is that their movement is trackable, and Web portals like Yahoo have access to a spectacular amount of data about where people go, how long they stay there and what they contribute to the conversation. Understanding this inundation of data is a challenge, but one that will be met by an enterprising media research company, and The Norman Lear Center would like to be part of that effort.



But what should be the object of study?

The mistake that many companies have made is their myopic focus on their own Web sites and their own brand. For example, online strategies often concentrate on counting visitors on dedicated Web sites, and tracking the appearance of a company's brand elsewhere on the Web. This type of data is essential, but it doesn't take into account the principles of the attention economy, its reliance on content calculated to amuse mass audiences and the agency of audience members, who are producing content and a data trail with every stroke of the keyboard and every click of the mouse. If we're hoping to understand this fragmented media landscape, we cannot concentrate on every niche within it. Instead, we should pull the camera back and look for the global audiences that gather eagerly around the content that dominates global conversations. These cultural touchstones are incredibly effective audience builders. These audiences are ad hoc, they shift among sites, across link trails, they enter various walled gardens and then report back on their adventures. Their meandering journey across platforms and channels is driven by their effort to find compelling content that resonates with their taste, their beliefs, their curiosity.

We call these potential audiences: "transnational fan communities."



What are transnational fan communities?

Global audiences cluster around the things they love (and the things they love to hate). Because of media convergence, mobile technology and greater access to broadband, media content travels ever more quickly across national boundaries. These media flows are multidirectional, but they are by no means random. Within these international flows, we will find what media scholar Henry Jenkins calls **"contact zones"** – places where clusters of geographically dispersed participants come together. Of course the reason they come together is because they're all seeking **the same compelling content**. This is where transnational fan communities gather.

And while these groups are extremely heterogeneous, they have been brought together by a common interest. Place and culture still matter, but fans who participate in these online communities are released from the constraints of geography to interact in real-time with fans around the world – many of whom have widely divergent understandings of the content that has brought them together, whether it's a Bollywood film, Japanese anime, Harry Potter books or the last season of *Lost*.

Transnational Fan Communities

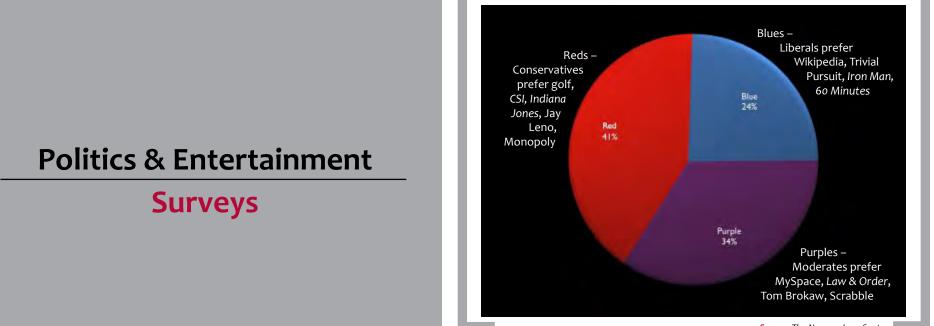
The Future Mass Audience



Audiences have never been homogenous.

Although advertisers often hope to segment consumers – most often by demographic traits – transnational fan communities resist ham-handed demographic profiles. They may end up dismantling tyrannous demographic categories, such as the 18-49 demo, which has had a profound effect on virtually all mass media programming in the U.S.

In fact, transnational fan communities may well represent the **future of the mass audience**.



Source: The Norman Lear Center

Over the last couple of years, the Norman Lear Center has conducted surveys about entertainment and leisure habits in the U.S. We've demonstrated that there are **"taste communities"** in the U.S., and within these groups, there's a strong correlation between entertainment preferences and deeply held political beliefs. It has been our goal to take these surveys global in order to locate and understand international taste communities as well. Recently, we took a step in this direction, **surveying 8,000 international students and scholars at USC**. What we are now gathering is data about transnational fan communities within this sample. Instead of focusing on demographics, we will look at respondents through the lens of their entertainment preferences. We'll look for correlations between their identities as fans and their attitudes toward global media issues, including censorship, piracy, translation and the impact of entertainment.

Obviously we need a deeper understanding of these transnational fan communities if we wish to understand the future of media.



To better understand audiences, we need better metrics. We are already inundated with information about online audiences. but there is very little agreement about how those audiences ought to be measured. And too often the focus is on demographics rather than behavior.

Metrics:

- time spent
- number of viewings
- rollovers
- clickthroughs
- pass-alongs
- ratings
- postings
- remixes
- mass distribution

We need more sophisticated metrics that take into account things like the level of audience engagement: time spent, number of viewings, rollovers, clickthroughs, passalongs, ratings, postings, remixes and mass distribution all indicate different levels of engagement.

Social networks won't financially succeed until we can measure engagement levels within the community.

These methods have been proposed in various places, in various ways, and certainly some individual sites are using them, but what's needed are consistent guidelines, consolidated data and a trustworthy organization to analyze the data and publish the results.

We believe that Barcelona Media could take global leadership in doing this and make a major impact. >>>



Interests:

- profiling users through data mining (information management)
- attention selection (decisions in motion)
- multiplatform entertainment content (ip salero)
- intercultural multimedia (cultural lab)

Barcelona Media is well-positioned to do this because of its unique nexus of interests.

Not only is it pursuing research on using **data mining to profile users** (part of its Information Management portfolio), it's also developing technologies to understand **attention selection** (part of its Decisions in Motion project), it's developing smart systems for **multiplatform entertainment content** delivery (IP Salero) and its Cultural Laboratory demonstrates its commitment to using multimedia technology to foster **intercultural conversations** among global audiences.



It takes a combination of methods to understand transnational fan communities – including web analytics, surveys, focus groups, data mining and content analysis. The datasets would need to be multinational.

Methods:

- web analytics
- surveys
- focus groups
- data mining
- content analysis

Deliverables would include, among other things, **a new map of the world**, a new way of understanding the boundaries among humans, which, in an age of mass self-communication, are less and less determined by geographic boundaries and more determined by taste.

This research would serve not only **the commercial economy**, but **the gift economy**, where participants are eager to understand the composition of their potential audience. This research would help academics, governments, global corporations and local cultural producers to better understand their audiences, their constituencies, and their consumers.

When it comes to entertainment, leisure and play, people generally exercise more **freedom** of choice than in any other realm of modern life. They choose to watch a movie, play chess, go to a concert or go shopping because they find it amusing. In short, look at the way people entertain themselves, and you'll discover what people wish to do for its own sake. If you're looking for a window into the global village, to assess its condition and its attitudes toward every imaginable aspect of contemporary life, there can be no better portal than global entertainment.



Social media is very new, the consequence of new technology. **But in some ways, it is also very old**.

The part of our nervous system that governs attention – that faculty has been hard-wired in our brain since our species roamed the savannahs in search of food.

Our love of stories and of idle talk is as old as the camp fires where our prehistoric ancestors gathered.

Strictly speaking, social media is a uniquely modern form of communication.



But one can't help thinking of what was discovered a century ago, 168 kilometers west of here, at La Roca dels Moros.

These cave paintings are about 7,000 years old. No one truly knows what motivated Upper Paleolithic people to paint them – religion, a fertility rite, a prayer for a good hunt, a desire to tell a story. But surely these paintings are among the most ancient examples of **mediated communication**.

The Dawn of Social Media:



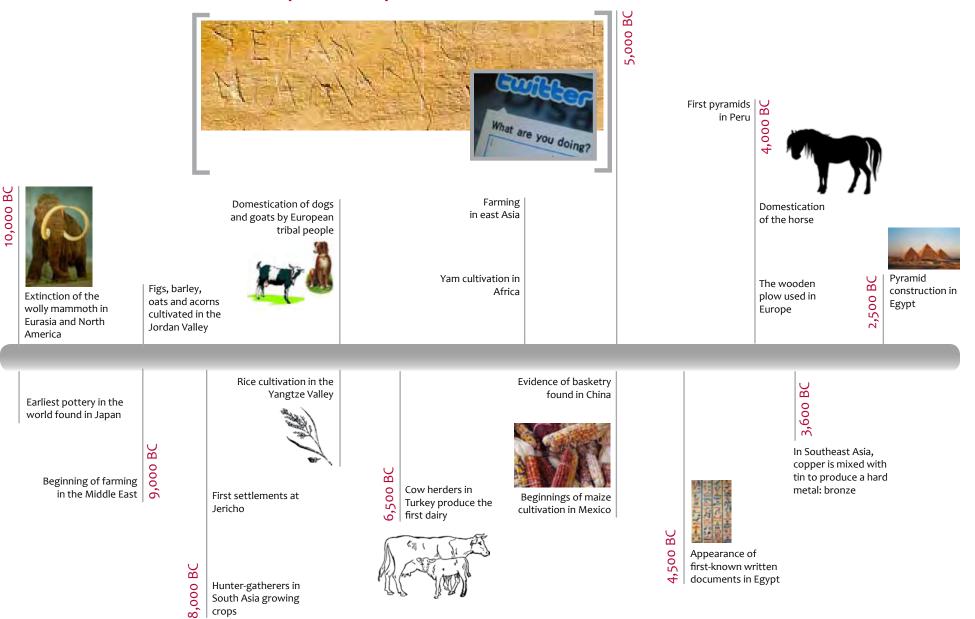
And if you look closely, you can also see, scratched into the rock, inscriptions by later hands. The lbers wrote on these walls. So did the Romans. So did others, in the 20th century, until the caves were protected and sealed off.



When those lbers and Romans and graffiti artists wrote on those walls, who was their audience? It was themselves, and others like themselves -- not yet mass self-communication, but self-communication nonetheless.

And what do these scratchings say? One way or another, their messages are all the same: "I am here." "I am doing this." "Pay attention to me." And so, perhaps, these messages are an ancient answer to a modern prompt: "What are you doing?"

Is it too mischievous to suggest that these scratchings, all less than 140 characters long...



... represent the prehistoric debut of Twitter?

45

Image Sources:

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